

TITLE V GRANTEE ANNUAL PLAN AND REPORT

A Step-by-Step Guide to Completing the Online
Title V Report Form.



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LOGIN

1. INTERNET BROWSER:

- Please use Chrome, Safari, Edge, or Internet Explorer (11 or higher).
- Firefox and older versions of Internet Explorer (10 or below) may not display contents properly.

2. Open this web link:

<https://epiweb.oha.state.or.us/fmi/webd#Title%20V%20Grantee%20Annual%20Plan%20and%20Report>

3. Enter in your Account Name and Password.

4. Click "OK".

NOTE: This was emailed to each Title V Grantee. If you don't have it, please contact: maria.n.ness@state.or.us

Log In

Open database "Title V Grantee Annual Plan and Report" with:

☐ Guest Account

☒ Account Name and Password

Account Name:

Password:

Cancel OK

LOGIN (Cont.)

NOTE: If this is your first time logging in. You will be prompted to reset your password. Your new password will need to be a minimum of 8 characters long.

Change Password

You must change the password for your FileMaker account before opening this file. Please enter your old password once and your new password twice.

Account Name: DEMO Grantee

Old Password: *****

New Password:

Confirm New Password:

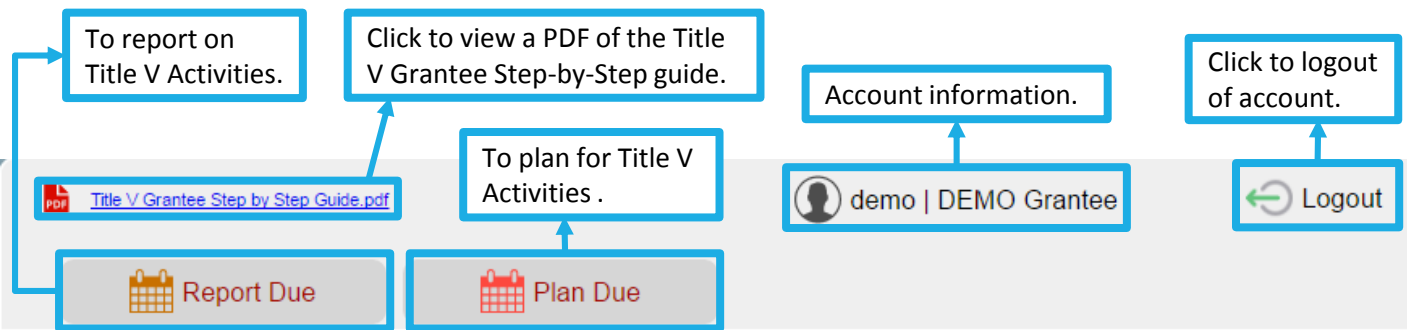
Password Quality: Weak

Cancel OK

NOTE: You do not have to complete the Report/Plan in one sitting. The system will automatically save any information that you enter.

MAIN PAGE

NOTE: This is an informational page showing the page layout, this is for your reference only.



Report/Plan: Oregon Title V Maternal and Child Health Block Grant

INSTRUCTIONS FOR COMPLETING YOUR TITLE V REPORT AND PLAN

By March 1st you will need to complete both a Report on Title V activities through December 2016 (first half of FY 2017); and a Plan for Title V activities from July 1, 2017 – June 30, 2018 (FY 2018).

- You do not have to complete the report/plan in one sitting. The system will automatically save any information that you enter. You can come back and complete it later, and submit when your entire report/plan is completed.

Report Instructions: (Report will cover activities completed up through December 2016)

STEP 1. Click on "Report Due" button above.

STEP 2. You will not be able to edit last year's Grantee Information, Strategy and Funding Table, or Plan.

STEP 3. For each of your selected Strategies, complete Report sections (Measure Outcomes, Progress, Challenges, Partners, etc.).

STEP 4. To access Report sections, click on the edit button next to each selected Strategy in the Strategy and Funding Table.

Plan Instructions: (Plan will address your upcoming activities for July 2017 through June 2018)

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STEP 4. For each selected Strategy, complete Plan sections (Rationale, Planned Activities, Timeline, etc.).

STEP 5. To access Plan sections, click on the edit button next to each Strategy in the Strategy and Funding Table.

Submission Instructions:

When you have completed both your Report and Plan, click on the button at the bottom of this screen to submit. If you need to modify either the Report or Plan after submission, then make changes and click the submit button again to re-submit.

Questions? Please Contact:

Nurit Fischler
nurit.r.fischler@state.or.us
(971) 673-0344

OR

Maria Ness
maria.n.ness@state.or.us
(971) 673-0383



Submit Report and Plan


Contact information
for any questions.


Title V information, reporting, planning,
and final submission instructions.


Once everything is complete,
click for final submission.


MAIN PAGE (Cont.)


5. Click on "Report Due".

 [Title V Grantee Step by Step Guide.pdf](#)

 demo | DEMO Grantee

 Logout

 Report Due

 Plan Due

Report/Plan: Oregon Title V Maternal and Child Health Block Grant

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**Questions?
Please Contact:** **Nurit Fischler**
nurit.r.fischler@state.or.us (971) 673-0344

OR **Maria Ness**
maria.n.ness@state.or.us (971) 673-0383

 Submit Report and Plan

REPORT

NOTE: This page includes the Grantee information and the Strategy and Funding Table you submitted with your plan last year. This information is for your reference and cannot be edited.

Title V Reporting Instructions:

This is a report on the activities that you included in your FY 2017 Title V annual plan. The information provided below from last year's plan is for your reference. You cannot edit this information. If your strategies or activities have changed you can include that information in your report, and new strategies for next year can be added in the annual plan section of this submission.

Title V Grantee Information

Grantee Name:	DEMO Grantee
Name of Staff Completing Form:	
Phone #:	
Email Address:	
Date Completed:	<input type="checkbox"/>


Grantee information.

Title V Strategy and Funding Table

Strategy and Funding Table Instructions:

- The Strategy and Funding Table has information about each priority/strategy that you included in last year's plan. You will not be editing this information.
- For each strategy in your plan, click on the edit button on the right side of the row. This will take you to the page where you will report on your activities and measures for that strategy.
- When you have finished reporting on a strategy, click the "Return to Strategy and Funding Table" button at the bottom of the screen and select another strategy to report on.
- When you have reported on all of your strategies, return to the main menu page to work on your plan.

Icon Key:

 To enter activity plans or report on a strategy

Previous year's
Grant \$ amount.

Grant year.

Funding Period: July 1, 2016 - June 30, 2017

Fiscal Year: 2017

Grant Amount: \$50,000

Title V Funds
(Enter % that will be budgeted):

Title V indirect funds (Max 10%)
(Strategy Not Applicable)

10.0% = \$5,000.00

National Priority Area / Strategy

Well Woman Care

% \$ (Auto-Calculated)

1. Case-management to improve utilization of well-woman care.

40.0% = \$20,000.00



4. Provide education/training on preconception/interconception health for providers (all types).

20.0% = \$10,000.00



Breastfeeding

% \$ (Auto-Calculated)

6. Increase access to workplace breastfeeding support

10.0% = \$5,000.00



REPORT (Cont.)

6. Click on Edit button to enter report information for each Strategy that you included in your plan.

Title V Grantee Information


Grantee Name:	DEMO Grantee
Name of Staff Completing Form:	
Phone #:	
Email Address:	
Date Completed:	

Title V Strategy and Funding Table

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Icon Key:

 To enter activity plans or report on a strategy

Funding Period: July 1, 2016 - June 30, 2017		Fiscal Year: 2017	
		Grant Amount: \$50,000	
		Title V Funds (Enter % that will be budgeted):	
Title V indirect funds (Max 10%) (Strategy Not Applicable)		10.0%	= \$5,000.00
National Priority Area / Strategy			
Well Woman Care		%	\$ (Auto-Calculated)
1. Case-management to improve utilization of well-woman care.	40.0%	=	\$20,000.00
4. Provide education/training on preconception/interconception health for providers (all types).	20.0%	=	\$10,000.00

REPORT (Cont.)

NOTE: The Activities and Measures you submitted in last year's plan are entered here, and cannot be edited. They are provided for your ease of reference while writing your report.



[Return to Strategy and Funding Table](#)



demo | DEMO Grantee



[Logout](#)

Plan Period: July 1, 2016 - June 30, 2017

Priority Area: Well Woman Care

Strategy

1. Case-management to improve utilization of well-woman care.

Lead staff for this strategy

[Name of staff person](#)

Rationale

Rationale for choosing this strategy (local data, partner alignment, etc.)

Some screening and referral is already done as part of home visiting programs but we want to strengthen our efforts around interconception/well woman care. Many of our clients are new to having access to health insurance after pregnancy so they need assistance navigating care. In addition, many undocumented women in our community do not have access to health insurance after 2 months post-partum so they need assistance navigating low or no-cost preventive care.

Activities

Planned Activity



April-June: 1) Develop policy around pregnancy intention screening and referral to well-woman care including documentation of activities 2) Pilot screening and documentation with 1 home visitor 3) Establish baseline data July: Train all home visitors in pregnancy intention screening (see first strategy) August: All home visitors begin screening and referral (and documentation) November: Review process, review client records, revise strategy as

Timeline

[When will this activity take place?](#)

Target Populations



Post-partum home visiting clients, undocumented women.

Measures

Measure Definition (minimum of one measure per strategy)



Measure Target



Measure Numerator (if applicable)



Measure Denominator (if applicable)



Data Source of Measure



2) % referred to appropriate well woman care

80%

woman not already receiving well woman care who received a referral

Number of home visiting clients not already receiving well woman care.

Client records

1) % of post-partum home visiting clients screened for pregnancy intention

80%

of women screened for pregnancy intention

of post-partum home visiting clients

Client records

Technical Assistance Needs

We need assistance in developing a system that can be used for tracking our measures.

REPORT (Cont.)

7. For each of your selected Strategies, complete:

- Measures
- Progress / Successes
- Challenges / Lessons Learned
- Partners Engaged
- In-kind or Other Resources Leveraged
- Strategy Continuing / Completed

REPORT Calendar Year 2017

Measures ← Measures is auto-filled below. Enter the outcome and numerator / denominator for each measure. Scroll down to see more

Measure Definition	Measure Outcome ?	Measure Numerator (if applicable) ?	Measure Denominator (if applicable) ?
Progress / Successes ← Describe the progress and successes in implementing your strategy.			
Challenges / Lessons Learned ← What challenges did you encounter and what lessons did you learn?			
Partners Engaged ← What partners did you engage?			
In-kind or Other Resources Leveraged ← Describe partner or other program contributions.			
Strategy Continuing / Completed ←			

Return to Strategy and Funding Table to report on additional strategies

Return to Main Page

REPORT (Cont.)

8. Click on “Return to Strategy and Funding Table to report on additional Strategies”.

REPORT Calendar Year 2017

Measures Each of your plan measures is auto-filled below. Enter the outcome and numerator / denominator for each measure. Scroll down to see more

Measure Definition

Measure Outcome ?

Measure Numerator (if applicable) ?

Measure Denominator (if applicable) ?

Progress / Successes

Describe the progress and successes of implementing your strategy.

Challenges / Lessons Learned

What challenges did you encounter and/or lessons did you learn?

Partners Engaged

What partners did you engage?

In-kind or Other Resources Leveraged ?

Describe partner or other program contributions.

Strategy Continuing / Completed



Return to Strategy and Funding Table to report on additional strategies



Return to Main Page

REPORT (Cont.)

9. Review and report on all selected Strategies for remaining National, State, and Other Priority Areas. (Repeat Steps 6-8 as needed).

10. When all strategy reports have been entered, click on “Return to Main Page” to enter next year’s annual plan.

Other Locally Identified Priority Area Funded by Title V / Strategy		Title V Funds (Enter % that will be budgeted):	
Other Locally Identified Priority Area	%		\$ (Auto-Calculated)
<input type="text"/>	<input type="text"/>	=	<input type="text"/>
Total for Other Priority Area(s):		<input type="text"/>	<input type="text"/>
Grand Total:		Total % and \$ Title V Funds Budgeted 100.0% \$12,000.00	

Questions?
Please Contact:

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nurit.r.fischler@state.or.us
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OR


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PLAN


11. Click on “Plan Due”.

 [Title V Grantee Step by Step Guide.pdf](#)

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 Logout

 Report Due

 Plan Due

Report/Plan: Oregon Title V Maternal and Child Health Block Grant

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Plan Instructions: *(Plan will address your upcoming activities for July 2017 through June 2018)*
STEP 1. Click on "Plan Due" button above.
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 Submit Report and Plan

PLAN (Cont.)

NOTE: This is an informational page showing the page layout, this is for your reference only.

Title V general
plan instructions.



[Return to Main Page](#)



demo | DEMO Grantee



[Logout](#)

Title V Annual Plan Instructions:

This is a plan for Title V activities from July 1, 2017 to June 30, 2018 (FY 2018).

Grantees funded at less than \$25,000 per year are required to work on a minimum of 1 Priority; \$25,000-\$99,000 per year a minimum of 2 Priorities; \$100,000 or more per year a minimum of 3 Priorities.

Title V Grantee Information

Grantee Name: DEMO Grantee

Name of Staff Completing Form:

Phone #:

Email Address:

Date Completed:

Grantee
information.

Title V Strategy and Funding Table

Strategy and Funding Table Instructions (Plan Year Only):

Complete the Strategy and Funding Table below to indicate which priorities and strategies your agency plans to implement, and how much Title V funding will be allocated to each.

- In the table below, click on the + button next to each priority that your agency plans to work on.
- Next, select at least one strategy from the drop down menu for that priority. (For other locally identified priority areas, type in your strategies.)
- Enter the percentage of your Title V funds that you have allocated to each strategy (the dollar amount will automatically calculate based on your projected grant amount).
- To add another strategy, click the + button next to the priority name and another row with a strategy drop-down box will appear. Repeat above steps for the new strategy.
- Move down the table until you have entered all of the priorities and strategies that your agency plans to work on. NOTE: Check to be sure that your funding allocation totals to 100%.
- To complete your plan, you must enter information about your activities and measures for each strategy selected. To do this, click on the edit button on the right of the row for each strategy and complete the requested information.

Instructions how to plan using
Strategy and Funding Table.

PLAN (Cont.)

12. Enter in Grantee information.

[Return to Main Page](#)

demo | DEMO Grantee

[Logout](#)

Title V Annual Plan Instructions:

This is a plan for Title V activities from July 1, 2017 to June 30, 2018 (FY 2018).

Grantees funded at less than \$25,000 per year are required to work on a minimum of 1 Priority; \$25,000-\$99,000 per year a minimum of 2 Priorities; \$100,000 or more per year a minimum of 3 Priorities.

Title V Grantee Information

Grantee Name: DEMO Grantee

Name of Staff Completing Form:

Phone #:

Email Address:

Date Completed:



Title V Strategy and Funding Table

Strategy and Funding Table Instructions (Plan Year Only):

Complete the Strategy and Funding Table below to indicate which priorities and strategies your agency plans to implement, and how much Title V funding will be allocated to each.

- In the table below, click on the + button next to each priority that your agency plans to work on.
- Next, select at least one strategy from the drop down menu for that priority. (For other locally identified priority areas, type in your strategies.)
- Enter the percentage of your Title V funds that you have allocated to each strategy (the dollar amount will automatically calculate based on your projected grant amount).
- To add another strategy, click the + button next to the priority name and another row with a strategy drop-down box will appear. Repeat above steps for the new strategy.
- Move down the table until you have entered all of the priorities and strategies that your agency plans to work on. NOTE: Check to be sure that your funding allocation totals to 100%.
- To complete your plan, you must enter information about your activities and measures for each strategy selected. To do this, click on the edit button on the right of the row for each strategy and complete the requested information.

PLAN (Cont.)

NOTE: This is an informational page showing the page layout, this is for your reference only.

When the percent of grant funds allocated is entered here, the dollar amount will be automatically calculated and shown to the right.

Grant amount is projected based on last year's funding.

Funding Period: July 1, 2017 - June 30, 2018

Fiscal Year: 2018
Projected Amount: \$15,000

Title V Funds
(Enter % that will be budgeted):
10.0% = \$1,500.00

National Priority Area / Strategy
Select at least one strategy from the drop down lists below for each National Priority Area you plan to work on:

	%	\$ (Auto-Calculated)
Well Woman Care		
3. Use traditional and social marketing to educate the population and promote well woman care.		
5. Support access to well-woman care through Family Planning Clinics.		

Click to add a Strategy for a Priority Area.

NOTE: Multiple Strategies can be added to a Priority Area, add as many Strategies as needed.

Click to input planned Activities and Measures.

Click to delete a Strategy.

Scroll up/down to view all created Strategies.


PLAN (Cont.)

13. If you would like, you can allocate up to 10% of grant to Indirect Funds.


Funding Period: July 1, 2017 - June 30, 2018	Fiscal Year: 2018 Projected Amount: \$15,000 Title V Funds (Enter % that will be budgeted):
Title V indirect funds (Max 10%) (Strategy Not Applicable)	10.0% \$1,500.00

14. Select at least one National Priority Area in which to work. Click on "+" button to add a Strategy.

NOTE: Multiple Strategies can be added. Add as many Strategies as needed.

National Priority Area / Strategy Select at least one strategy from the <u>drop down lists below</u> for each National Priority Area you plan to work on:	%	\$ (Auto-Calculated)
 Well Woman Care		
Please select the appropriate strategy from the drop-down list.		

15. For **National and State Priority Area(s)**, select a Strategy from drop-down list. For **Other Priorities Area(s)**, type in custom Strategy.

National Priority Area / Strategy Select at least one strategy from the <u>drop down lists below</u> for each National Priority Area you plan to work on:	%	\$ (Auto-Calculated)
 Well Woman Care		

PLAN (Cont.)

16. Enter in % of Title V funds to be allocated for this Strategy.

National Priority Area / Strategy
Select at least one strategy from the drop down lists below for each National Priority Area you plan to work on:

Well Woman Care

Please choose the appropriate strategy form the drop-down list.

% \$ (Auto-Calculated)

17. If applicable, repeat Strategy selection and entry of grant % for all National, State, and Other Priority Areas that you plan to work on. (Repeat Steps 14-16 as needed).

18. Before inputting planned Activities and Measures, scroll down to the bottom of the page and confirm “Grand Total” is equal to 100.0%.

NOTE: If NOT 100.0%, adjust % allocated to Strategies until 100.0%. Once it equals 100.0%, continue to Step 19.

Grand Total: Total % and \$ Title V Funds Budgeted
100.0%

19. Scroll up to your first selected Strategy.

20. Click Edit button to input planned Activities and Measures.

National Priority Area / Strategy
Select at least one strategy from the drop down lists below for each National Priority Area you plan to work on:


Well Woman Care

Please choose the appropriate strategy form the drop-down list.

% \$ (Auto-Calculated)

PLAN (Cont.)

NOTE: This is an informational page showing the page layout, this is for your reference only.

[Return to Strategy and Funding Table](#)  [Logout](#)

Plan Period: July 1, 2017 - June 30, 2018

Priority Area: Well Woman Care

Strategy

3. Use traditional and social marketing to educate the population and promote well woman care.

Lead staff for this strategy


Name of staff person

Rationale

Rationale for choosing this strategy (local data, partner alignment, etc.)

Please describe your reasons for selecting this strategy.

Activities Enter one Activity / Timeline Target Populations

 Add Activity


Click to add Activity.

NOTE: Multiple Activities can be added. Add as many Activities as needed.

Click for instructions about that specific field.

Click to delete Activity.

Measures Enter one Measure per row. For additional rows click the "+ Add Measure" button.

 Add Measure

Click to add Measure.

NOTE: Multiple Measures can be added. Add as many Measures as needed.

Click to delete Measure.

[Return to Strategy and Funding Table to plan on additional strategies](#) [Return to Main Page](#)

PLAN (Cont.)

21. Your selected Strategies will be pre-populated. For each Strategy, type in lead staff.

Priority Area: Well Woman Care

Strategy

3. Use traditional and social marketing to educate the population and promote well woman care.

Lead staff for this strategy

22. Complete Rationale for selecting that Strategy.

Rationale

Rationale for choosing this strategy (local data, partner alignment, etc.)

Please describe your reasons for selecting this strategy.

23. For Activities, complete:

- Planned Activity
- Timeline
- Target Populations

NOTE: Click “+” button to add one or more Activities. Add as many Activities as needed.

Activities Enter one Activity / Target Population per row. For additional rows, click “+ Add Activity” button.

+ Add Activity
Planned Activity

Describe the activity you will conduct to accomplish this strategy.

Timeline

When will this activity take place?

Target Populations

Who will the activity impact?

PLAN (Cont.)

24. For Measures, complete:

- Measure Definition (Minimum of one measure per strategy)
- Measure target
- Measure Numerator (If applicable)
- Measure Denominator (If applicable)
- Data Source of Measure

NOTE: Click “+” button to add one or more Measures. Add as many Measures as needed.

Measures Enter one Measure per row. For additional rows click the "+ Add Measure" button.

Add Measure (plus icon)

Measure Definition (minimum of one measure per strategy)

Measure Target

Measure Numerator (if applicable)

Measure Denominator (if applicable)

Data Source of Measure

Describe the measure.

Describe outcome.

Numerator description.

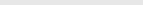

Denominator description.

What is the source of data?

25. Enter in any Technical Assistance Needs.



26. Return to Strategy and Funding Table to enter plans for additional Strategies. (Repeat Steps 20-25 for each Strategy).

  [Return to Strategy and Funding Table to plan on additional strategies](#)

PLAN (Cont.)

27. After plans for each Strategy have been entered, click on “Return to Main Page”.

Other Locally Identified Priority Area Funded by Title V / Strategy		Title V Funds (Enter % that will be budgeted):	
Grantees may use up to 20% of Title V funding for locally identified priority areas. Type in each locally identified strategy below that you plan to work on:		%	\$ (Auto-Calculated)
+ Other Locally Identified Priority Area			
Please describe your strategy.			
Total for Other Priority Area(s):			
Grand Total:		Total % and \$ Title V Funds Budgeted	
		100.0% \$15,000.00	

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SUBMIT REPORT/PLAN


28. Confirm all information has been completely and accurately entered in “Report Due” and “Plan Due”.


29. Click on “Submit Plan and Report”.


NOTE: If you need to modify either the Report or Plan after submission, return to the appropriate section, make changes and click on “Submit Plan and Report” again to re-submit.

 [Title V Grantee Step by Step Guide.pdf](#)

 demo | DEMO Grantee

 Logout

 Report Due

 Plan Due

Report/Plan: Oregon Title V Maternal and Child Health Block Grant

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 Submit Report and Plan


SUBMIT REPORT/PLAN (Cont.)

30. Click on “Logout”.

Plan/Report: Oregon Title V Maternal and Child Health Block Grant

Thank you for completing the Title V Plan/Report

 Back to Main Menu

 Logout




LANDING PAGE

NOTE: You will see this landing page after you logout. It shows the lists of all systems currently in use. “Title V Grantee Annual Plan and Report” located on the bottom is the one you are using.


To log back in from this page, please click on the folder icon above “Title V Grantee Annual Plan and...”. If you are complete, please close the browser.

FileMaker WebDirect


Filter




CD Summary CME




Certification Application Form for...




ControlMeasuresOnline




EHDI




keene_compendum




Memento Morbi




OR-Epi Reg




Oregon MothersCare




Oregon MothersCare Test



Salmonella



SBHC



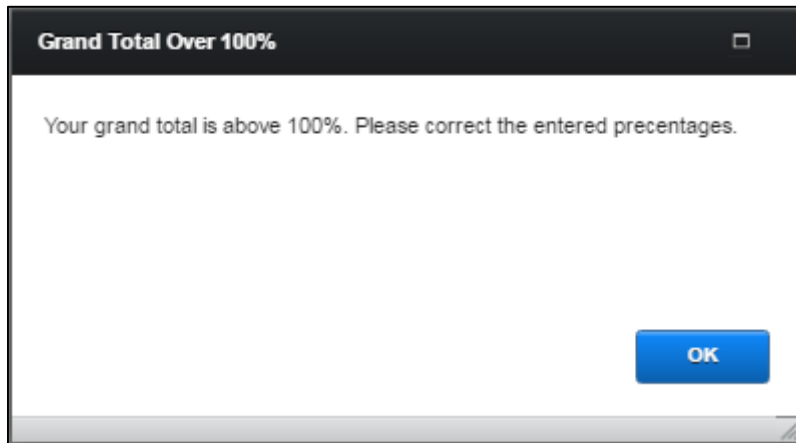
Title V Grantee Annual Plan and ...

Title V Grantee Annual Plan and Report Form.


ERROR MESSAGES

NOTE: When errors occur, an error message box will appear when you try to logout of your account or when you navigate to another page. Please read error details carefully and fix before submitting your plan.


Error: “Your grand total is above 100%. Please correct the entered percentages.”



Reason: Grand Total % of grant allocated is over 100.0%.

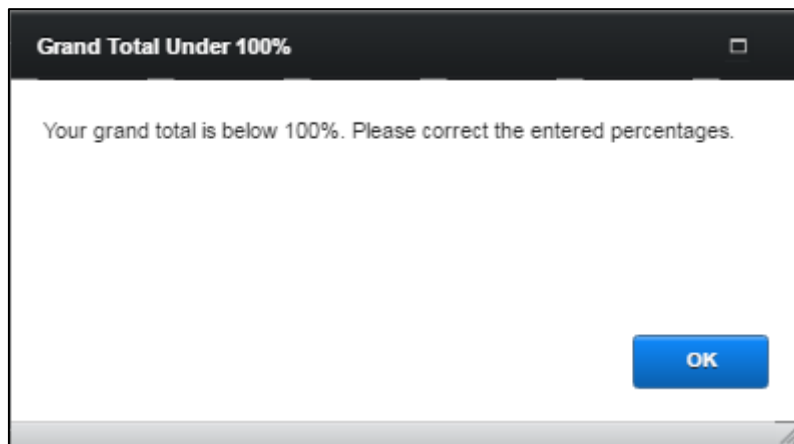
Grand Total:			<u>Total % and \$ Title V Funds Budgeted</u>
		101.0%	\$15,150.00

Solution: Lower % of grant allocated for Strategies so it is exactly 100.0%.


Grand Total:			<u>Total % and \$ Title V Funds Budgeted</u>
		100.0%	\$15,000.00

ERROR MESSAGES (Cont.)


Error: “You grand total is below 100%. Please correct the entered percentages.”



Reason: Grand Total % of grant allocated is under 100.0%.

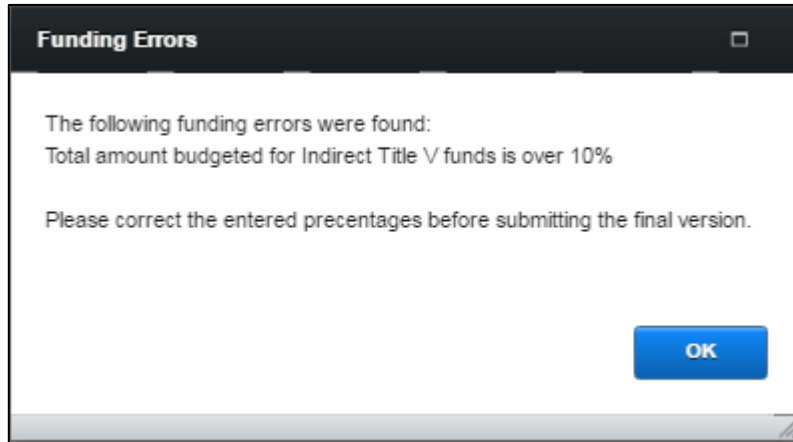
Grand Total:			<u>Total % and \$ Title V Funds Budgeted</u>
		94.0%	\$14,100.00

Solution: Increase % of grant allocated for Strategies so it is exactly 100.0%.

Grand Total:			<u>Total % and \$ Title V Funds Budgeted</u>
		100.0%	\$15,000.00

ERROR MESSAGES (Cont.)

Error: “Total amount budgeted for Indirect Title V funds is over 10%.”



Reason: Total % of grant allocated for Indirect Funds is over 10%.

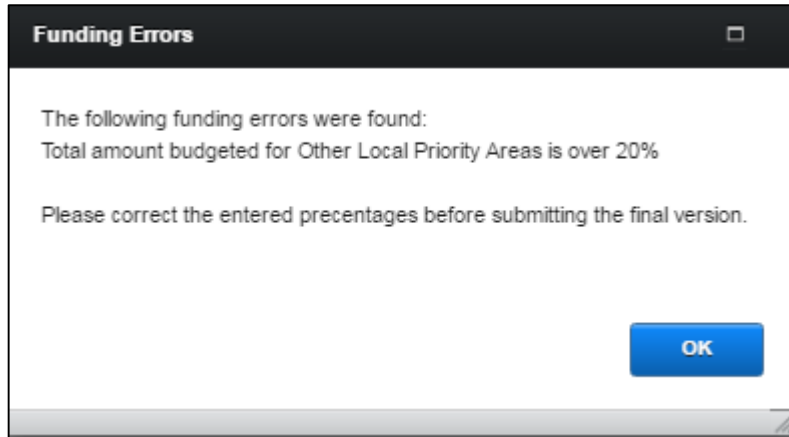
Funding Period: July 1, 2017 - June 30, 2018		Fiscal Year: 2018
		Projected Amount: \$15,000
		Title V Funds (Enter % that will be budgeted):
Title V indirect funds (Max 10%) (Strategy Not Applicable)	22.0%	= \$3,300.00

Solution: Lower % of grant allocated for Indirect Funds to 10% or less.

Funding Period: July 1, 2017 - June 30, 2018		Fiscal Year: 2018
		Projected Amount: \$15,000
		Title V Funds (Enter % that will be budgeted):
Title V indirect funds (Max 10%) (Strategy Not Applicable)	10.0%	= \$1,500.00

ERROR MESSAGES (Cont.)

Error: “Total amount budgeted for Other Local Priority Areas is over 20%.”



Reason: Total % of grant allocated for Other Priority Area(s) is over 20%.

Other Locally Identified Priority Area	%	\$ (Auto-Calculated)
	40.0%	\$6,000.00
Total for Other Priority Area(s):		40.0% \$6,000.00

Solution: Lower % of grant allocated for Other Priority Area(s) to 20% or less.

Other Locally Identified Priority Area	%	\$ (Auto-Calculated)
	20.0%	\$3,000.00
Total for Other Priority Area(s):		20.0% \$3,000.00

QUESTIONS / COMMENTS

For Title V Grantee Information

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